
Chart Module

User Guide – V 12.0

January 21, 2025



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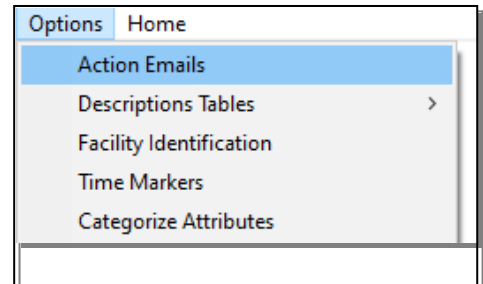
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Options

Action Emails

Email notifications can be sent to various recipients when a User performs one of the actions identified on the list. From the Main Menu, ensure that the email protocol has been setup under Maintenance before proceeding with the setup of **Action Emails**.

Select the **Actions** that should prompt an email notification by clicking on the corresponding check box.



 A screenshot of the 'Action Emails' configuration window. The title bar says 'DEBT - Action Emails'. A message at the top states: 'Make sure the email protocol has been setup under Maintenance.' Below this, there are three columns: 'Check the Actions that should prompt an email notice', 'Action By', and 'Email To'. Under 'Check the Actions...', three items are listed with checkboxes: 'Incident added from Chart' (checked), 'Disability added from Chart' (unchecked), and 'Work Acc. Program added from Chart' (unchecked). To the right, there are instructions on how the feature works and how to use it, including a 'Get-F1' button to select users from the Security File.

For each **Action** selected, click on the **Action By** check box to activate the pop-up window to select the Users whose action will prompt an email. On the left of the pop-up window enter the first available blank line number from the **Current List** shown on the right. Click the Get-F1 to see and select the User Name from the Security File. Repeat to add another User to the list.

Click Closed-F12 to return to the Action Emails panel and proceed to the **Email To** check box for each **Action** selected to activate the pop-up window.

 A screenshot of the 'Action By' pop-up window. The title bar says 'SF7 X Remove Name'. The main area is titled 'Action: Incident added from Chart'. It contains a text box for 'Enter line number from from box on the right' with the value '1'. Below this is a 'Get-F1' button with the text 'Get User Name From Security File'. Underneath are fields for 'User ID' (containing 'SARA') and 'Name' (containing 'Sara K'). On the right side, there is a 'Current List' of 25 numbered items, with '1. Sara K' and '2. Amy Cooper' visible. At the bottom right, there is a 'Close F12' button.

The **Email To** pop-up window is used to select the **Email**

Recipients resulting from the action. On the left of the pop-up window enter the first available blank line number from the **Current List** shown on the right. Click the Get-F1 to see and select the User Name from the Security File. Repeat to add another Recipient to the list.

CTB2 Email Recipients resulting from an action

Action: Incident added from Chart

SF7 Remove Name

Current List

1.	Karen - Cims Mgr
2.	Michele Blyth - Acct Mgr
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	
16.	
17.	
18.	
19.	
20.	

Enter line number from from box on the right

1

Get F1 Get User Name From Security File

User ID and Name

KFERRELL Karen - Cims Mgr

Email Address

k.ferrell@parklanesys.com

☐ Send an email to the Managing Staff, in addition to any users selected above.

Each time an Action is executed by a listed User, the Recipient will receive an email advising that the Action occurred.

Sara Kane

From: Health Safety Application [noreply@noreply.com]
Sent: Thursday, July 02, 2015 4:23 PM
To: Sara Kane
Subject: Notification of User Action

The following action was taken in the Parklane System.

--
 Action: Incident added from Chart
 --
 Date: 02 Jul 15 at 16:22
 User: Sara K
 --
 PKD-Company 1
 Module: Chart
 Employee: HREICH, JUDITH
 Department: IT, Information Technology
 Employee Key: 000119
 --
 Chart Date: 02 Jul 15
 Record will have asterisks in Incident directory
 --
 Please do not reply to this automated message.

Description Tables

The information compiled within the **Chart** module can assist in determining the major reasons for Health Care visits and resulting loss of productive time. This module also provides statistical information that can be used by management to assess the organization's health and safety and employee assistance program needs.

Anyone using the **Chart** must be given their own password along with a User ID for tracking and auditing purposes.

Before **Chart** can capture specific information related to a visit, there are 5 tables that need to be built. The client must define **Classifications, Reasons, Conditions, Treatments, and Actions**.

It is crucial that the description types reflect viable data related to a health centre visit. As an example:

1. 'Class' would reflect an Occupational or Non-Occupational visit for example.
2. 'Reason' would identify whether the visit was Initial, a Follow-up, Report by Phone, or perhaps a Consultation.
3. 'Condition' would identify the employee's presented illness or injury.
4. 'Treatment' perhaps would include specific medications provided and procedures conducted.
5. 'Action' would identify the end result of the visit. Did the employee return to work, go to their physician, go to the hospital, or go home?

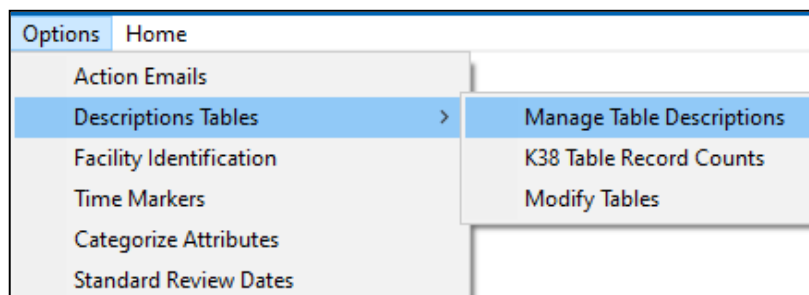
Ideally these table descriptions should allow the user to ask detailed meaningful questions of the system.

For example:

1. How many: Non-Occ / Occ / Non-Company
2. That were: Initial / Follow-up / Reported by Phone
3. Due to: Abrasion / Flu / Needlestick / Stress / Burn
4. Required: Cleansing / Dressing / Ice Pack / Medication / Consult
5. Resulting in: Return to Work / Mod Duties / To Family Doctor / To Emerg / Referral

Optionally, an attribute can then be highlighted to identify the specific body part.

From the menu, click **Options/DescriptionTables/Manage Descriptions** and select the table heading to be defined.



Enter your descriptions for the selected table

Classification	
Number	Description
1	NON-OCCUPATIONAL
2	OCCUPATIONAL
3	NON-COMPANY
4	INCORRECT ENTRY

CK03a Chart Descriptions

F1

F2

F3

F4

F5

Classification

Reason

Condition

Treatment

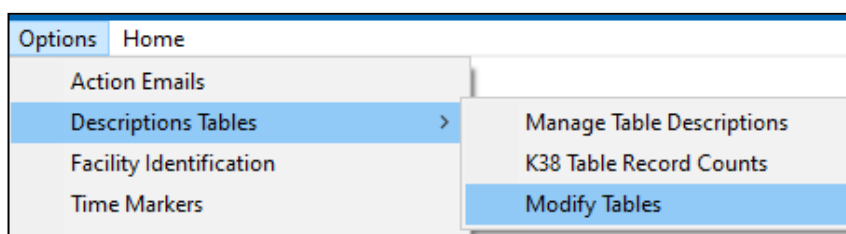
Action

Please note that when accessing these tables through a Chart record, the panel will sort the table alphabetically.

Modify Tables

Note: Changes cannot be reverted back once the revised table has been used.

Tagged entries may be moved or merged within a table. Run the K38 Table Record Counts. Determine which Table No. the entries are from and the Table No. the entries are to be move to. All users must be out of Chart and a Password must be obtained from Parklane Support before continuing with this procedure.



Today's Password

Parklane Code

Continue F5

Close F12

Enter the Password obtained from Parklane Support and press **Continue F5**. Select the Table in which the move or merge is required.

Move cursor to the desired table entry. In this example, entry number 10.

SL42 Select one option

F1 Classification

F2 Reason

F3 Condition

F4 Treatment

F5 Action

Select **F3 Move to** and indicate the new table entry.

CK30 Modify Chart Tables Reason

No. Description

F3 Move to:

Print

1	INITIAL VISIT		
2	FOLLOW-UP VISIT		
3	INITIAL REPORTING BY PHONE		
4	FOLLOW-UP BY PHONE		
5	MEDICAL TEST		
6	ASSESSMENT		
7	PHYSIOTHERAPY		
8	CHART REVIEW		
9	FORM EXPLANATION		
10	WEEKLY REVIEW		
11	MEETING		

Start SF1

No. Description

F3 Move to:

CK39 Reason

1	INITIAL VISIT		
2	FOLLOW-UP VISIT		
3	INITIAL REPORTING BY PHONE		
4	FOLLOW-UP BY PHONE		
5	MEDICAL TEST		
6	ASSESSMENT		
7	PHYSIOTHERAPY		
8	CHART REVIEW		
9	FORM EXPLANATION		
10	WEEKLY REVIEW		
11	MEETING		

Start SF1

Remove F7 Close F12

Exit F12

Once selected, the panel will reflect the move/merge request. Note that all historical records will reflect the changes and all changes will be recorded in the Audit. The old table entries/descriptions will be automatically removed once this process is complete. Prior to the system processing the changes, it will make a copy of pertinent files. These files will be located in the HS folder as HT0028.bck, HT0004.bck and HT00MA.bck

CK30 Modify Chart Tables

Reason

F3

Move to:

Print

No.	Description		
1	INITIAL VISIT		
2	FOLLOW-UP VISIT		
3	INITIAL REPORTING BY PHONE		
4	FOLLOW-UP BY PHONE		
5	MEDICAL TEST		
6	ASSESSMENT		
7	PHYSIOTHERAPY		
8	CHART REVIEW		
9	FORM EXPLANATION		
10	WEEKLY REVIEW	5	ASSESSMENT
11	MEETING		

Start SF1

Exit F12

Press **Start SF1** to continue. Confirmation will be required to proceed by selecting **Yes**.

QUESTION: CCHK3B

?

Proceed with modifications?
If yes,
Make sure all users out of this module

Yes

No

The system will acknowledge the move/merge is complete.
Press **OK**.

CCHK3B

i

Re-organization Successful

OK

Run the K38 Table Record Counts following the move/merge and confirm the record counts against the original K38 report.

Time Markers

To setup the user-defined tables for Time Markers, from the main menu of Chart, click on **More than Options/Tables/Time Markers**. The panel will default to the **Wait Times** table. Select the next available **Table no.** and then the **Description** field.

The screenshot shows the 'CTM7 Define Time Marker Descriptions' window. It has a title bar with the same text. In the top right corner, there is an 'SF5 Print' icon. On the left, there are two input fields: 'Table no.' and 'Description'. Below these fields, there are two buttons: 'Go to F1 Wait Times' and 'Go to F2 Notable Activities'. On the right side, there is a list box titled 'Wait Times' containing a numbered list: 1. Medical Documentation, 2. Initial Clm Decision, 3. Supervisor's WA Plan Implementation, 4. Response to letter, 5., 6., 7., 8., 9., 10., 11., and 12.

Once complete, click **F2 Notable Activities**. Select the next available **Table no.** and then the **Description** field.

The screenshot shows the 'CTM7 Define Time Marker Descriptions' window. It has a title bar with the same text. In the top right corner, there is an 'SF5 Print' icon. On the left, there are two input fields: 'Table no.' and 'Description'. Below these fields, there are two buttons: 'Go to F1 Wait Times' and 'Go to F2 Notable Activities'. On the right side, there is a list box titled 'Notables' containing a numbered list: 1. Initial Record Entry, 2. Phone Call with EE, 3. Phone Call with WSIB/Carrier, 4. Phone Call with Colleague, 5. Meeting with EE, 6. Update of WA Plan, 7. Update Attendance Plan, 8. School Meeting (WSIB RTW), 9., 10., and 11.

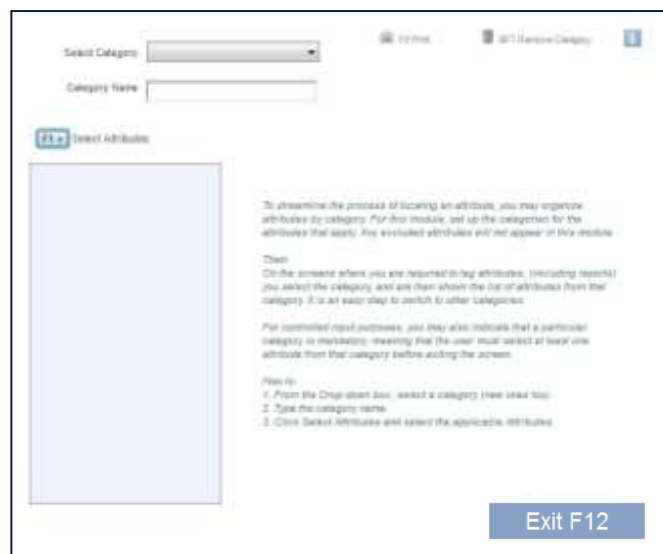
Categorize Attributes

To streamline the process of selecting attributes from a large table, they can be organized by category. For this module, setup the categories for the attributes which apply. Any excluded attributes will no longer appear in this module. On any of the panels where attributes are available to you for selection, including reports, you can select the category and then select the required attribute from the list associated with that category. It is an easy step to switch to other categories.

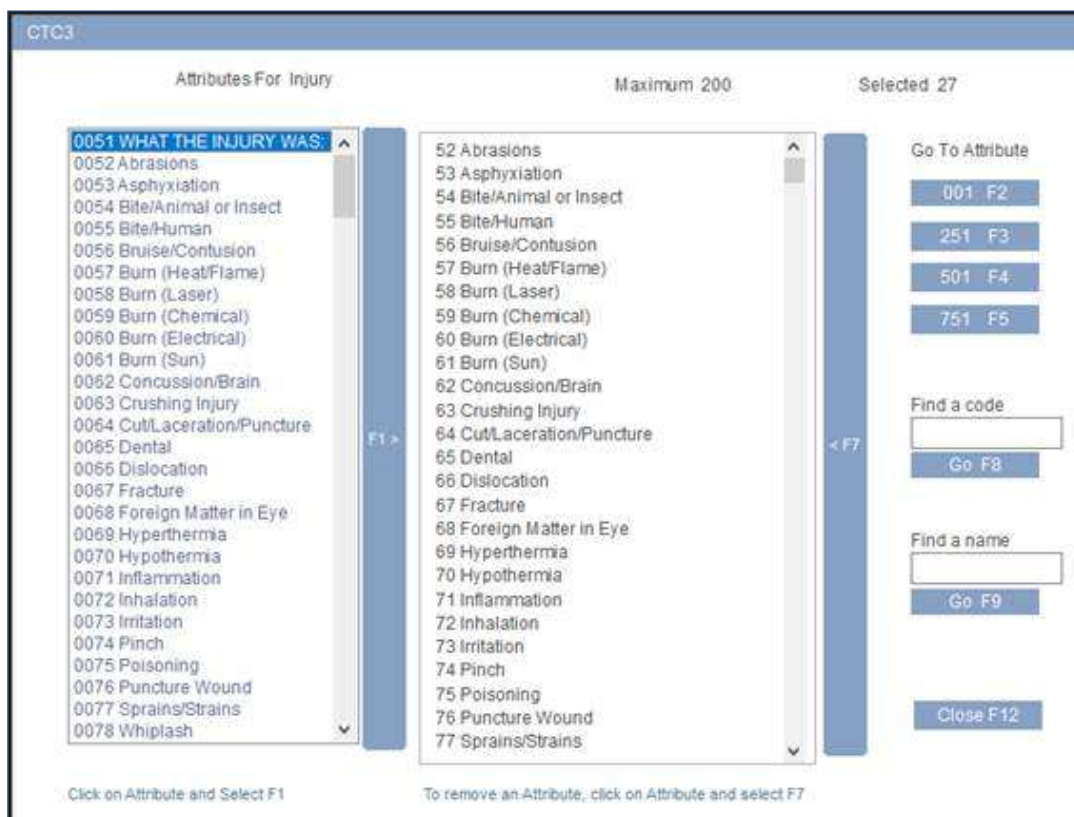
The screenshot shows a menu with two tabs: 'Options' and 'Home'. Under the 'Options' tab, there is a list of items: Action Emails, Descriptions Tables, Facility Identification, Time Markers, Categorize Attributes (which is highlighted in blue), and Standard Review Dates.

To categorize attributes, from the main menu of Chart, click on **More**, then **Options/Categorize Attributes**.

Using the arrow, select the next available category (initially the drop down list will show Category1, Category 2, etc.) and then type in the **Category Name** which you wish to use for your selection of attributes.



Click on the **F1>Select Attributes** button and you will be presented with the **Attributes for Category** panel:



Select an attribute and press **F1** to assign it to this Category. As you select the attributes they will appear in the box on the right. When finished, click on the **Close-F12** button to return to the Categorize Attributes panel

Standard Review Dates

Standard Review Dates allow the setup of multiple sets of routine activities that are normally done when tracking or following up on a record.

Select a set identifier and enter a **Description** name for the set. You may enter routine follow-ups and identify the interval (number of days) in relations to the start date of the record. You may enter up to 50 pre-defined activities or procedures per set. The interval days will be used to determine the target date of the activity.

CT3R Standard Review Dates

Go to **F1** General Visit Reviews
F2 Complex Visit Reviews
F3 Undefined Standards
F4 Undefined Standards
F5 Undefined Standards
F6 Undefined Standards
F7 Undefined Standards
F8 Undefined Standards

If you have the need to perform different activities depending on various scenarios, you may establish up to 8 sets of standard review dates. Otherwise, use F1 General Standards.

Exit F12

Once the Standard Review Dates are defined you may access the **Review Dates** panel of a new or current record and click on **Standards** and the system will provide the list of sets. Once a set is selected, the system will auto-fill those standard activities and determine the target date for each.

CT3S Standard Review Dates

Description **General Visit Reviews**

	Interval (Days)	Activity
1	3	CALL EE ABOUT RECENT VISIT TO HC - CURRENT STA'
2	5	IF DR NOTE WAS NOT REC'D - CALL EE AND DISCUSS
3		
4		
5		

Form Letter Templates

Form Letters can be used to send notices of letters to your employees. To create up to 50 letters, click on **Options/Form Letter Templates**.

The screenshot shows a menu with two tabs: 'Options' and 'Home'. Under the 'Options' tab, there is a list of items: 'Action Emails', 'Descriptions Tables', 'Facility Identification', 'Time Markers', 'Categorize Attributes', 'Standard Review Dates', and 'Form Letter Templates'. The 'Form Letter Templates' item is highlighted with a blue background.

Click on an undefined number.

Name your letter and then begin to compose the letter using text and variables.

The screenshot shows a dropdown menu titled 'SL94 Select one from the list'. The menu is open, showing a list of options: '1. Note Required Reminder', '2. Not defined', '3. Not defined', and '4. Not defined'. The first option is highlighted in blue.

The screenshot shows the 'Form Letter Template' creation interface. At the top, there is a text box for 'Name of Form Letter' containing 'Sample Chart Letter' and a checkbox for 'Reply Required'. Below this is a large text area for composing the letter, labeled 'a)'. The letter content includes placeholders for variables like '<Today-->', '<First and Last Name-->', '<Address-->', '<City, Province-->', '<ZipPost-->', 'Dear <First Name-->', 'Department: <Department-->', 'Position: <Position-->', 'RE: Visit Date <ChartDt-->', and a paragraph of text. The letter ends with 'Regards,' and 'Brenda Smith, RN'. To the right of the text area is a list of variables, labeled 'b) Variables', including 'Today's Date', 'First Name', 'Last Name', 'First & Last Name', 'Address', 'City, Province', 'Country', 'Postal Zip Code', 'Phone No.', 'Foreign Phone', 'Birth Date', 'Hire Date', 'EE ID', 'Department Code', 'Department', 'Position', 'Supervisor', 'Chart Date', 'Managing Staff', 'Classification', 'Reason1', 'Reason2', 'Condition1', 'Condition2', 'Condition3', 'Condition4', 'Treatment1', 'Treatment2', 'Treatment3', 'Treatment4', and 'Action1'. To the right of the variables list is a text box with instructions: 'To indicate the location of a variable. 1. Type ^ [Shift 6] in the letter. 2. [Tab] at this point will move cursor to Variables. 3. Click on or down/up arrows to variable name. 4. Select F4. 5. Variable will be inserted and cursor will return to the letter.' Below the variables list are buttons for 'Page 1 F6', 'Page 2 F7', and 'Page 3 F8'. At the bottom of the interface are buttons for 'Instructions F1', 'Pdf Print F5', 'List F2', and 'Exit F12'. There is also a 'Print Font Size' section with radio buttons for 9 pt, 10 pt, and 12 pt, and a note: 'Changing font size may require reformatting your letter. Be sure to print a sample.'

Click the **Instruction F1** button to see detailed instructions and additional features in **Form Letters**.



Form Letter Templates

Introduction

Form Letters give you the means to set up letters that you will use repeatedly.

You initially create a template for a letter and from that point on, you may easily produce personalized letters with the original text and applicable information included.

The letters may then be printed or emailed directly from the software. All emailed form letters are automatically added to Document Links.

A form letter may be one to three pages in length.

How to Use

Template

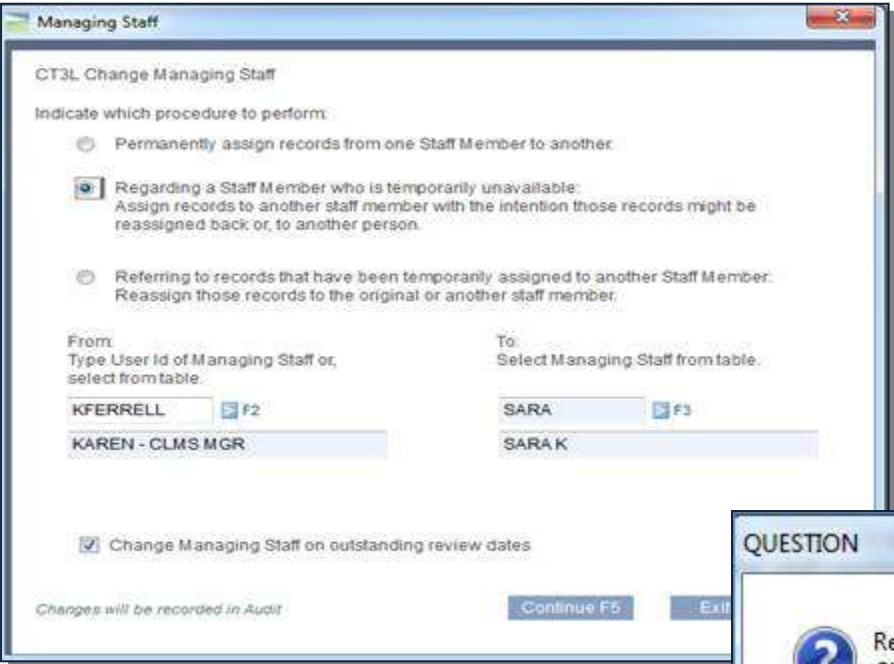
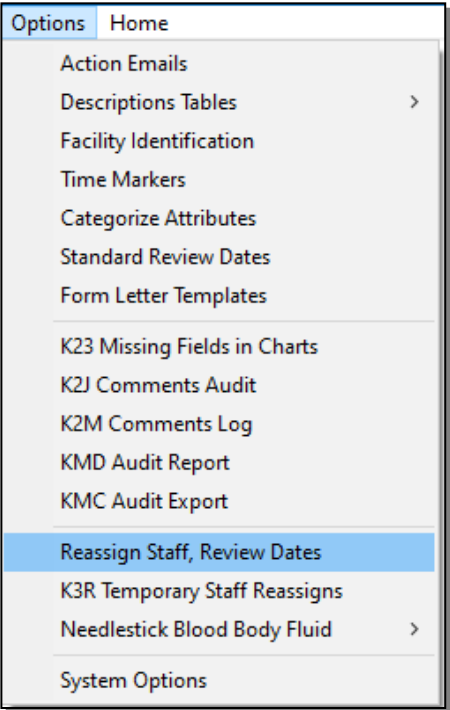
Select a template from the list.

- For a new template, select the first 'Not Defined'.
- Provide a name or description of the template.
- Under "Variables" there is a list of the personalized information that can be inserted in the template.
- In the Template area, type the text as it is to appear in the letter.

Reassign Managing Staff on Review Dates

As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field for all outstanding Review Date records from one User ID to another. In the case of a temporary reassignment, the records can be reassigned back to the original user or another user.

Under **Options** select **Reassign Managing Staff on Review Dates**. Select the intended procedure by clicking on the radio button. Type or select the User ID of the Managing Staff the records will come from, then type or select the User ID of the Managing Staff the records will be reassigned to and press Continue F5.



A question box will appear asking for confirmation of the reassignment.



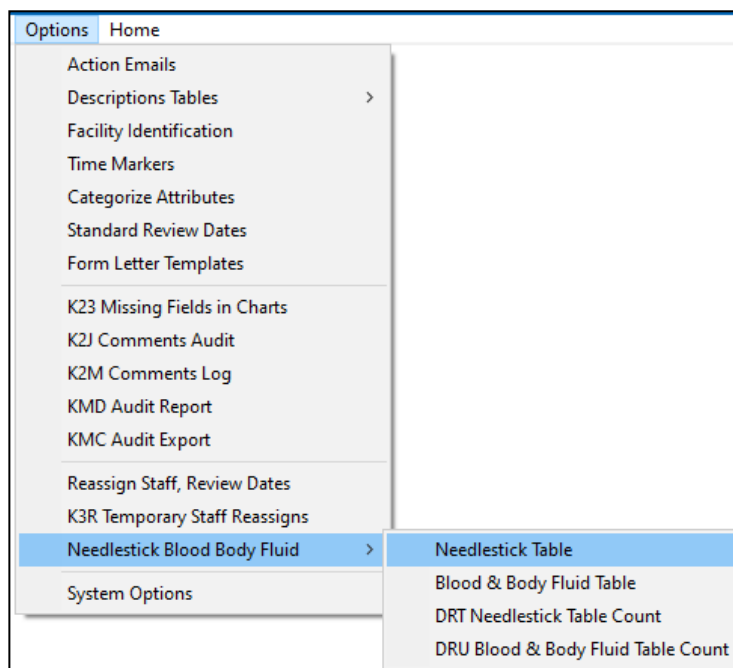
Once the utility is complete, a report will be generated which provides the details of the reassignment.

PKD-Company 1				Page	0001	K3T
Chart				Date	30 Mar 17	
Review Dates Reassigned from KFERRELL to SARA				Time	11:11	
Temporarily Assign						
Employee	Date	To Be Done		Key		
BROOK, SHARO 166 F/t	30 Dec 16	Review & F/U on EE		66		
BROOK, SHARO 166 F/t	04 Jan 17	Letter, ChartDt 29 Dec 16 9:06, Sample Chart Letter		66		

Needlestick, Blood, Body Fluid

In order to simplify the population of these tables, Parklane can electronically provide pre-defined descriptions at your request. Contact Parklane Support for details.

To manually setup the user-defined tables for Needlestick & Sharp Object and Blood & Body Fluid Exposure, from the main menu of **Chart**, click on **Options/Needlestick, Blood, Body Fluid**. Click on the first flyout to proceed to **Needlestick Table**:



Needlestick Table

Maximum characters for Category is 55

Table no.

Description

Go to:

- 12 Job Category of the Injured Worker
- 13 Where did Injury Occur
- 14 Sharp Item
- 15 Sharp Item Originally Used
- 17 Did the Injury Occur?
- 18 Type of Device Caused the Injury - Needle
- 19 Type of Device Caused the Injury - Surgical
- 20 Type of Device Caused the Injury - Glass
- 22 Type of Device Caused the Injury - Other
- 23 Protective Mechanism Activated
- 24 Exposure Incident
- 25 Was the Injury
- 26 Sharp Item Penetrated

Never change the description of a table entry once it has been used. This results will be irreversible.

Enter Description Number

To change a description enter the number

Job Category of the Injured Worker

1. Doctor (attending staff); specify specialty*
2. Doctor (intern/resident/fellow); specify specialty
3. Medical Student
4. Nurse - RN
5. Nurse - LPN/CNA/HHA
6. Nurse - NP
7. Nurse - CRNA
8. Nursing Student
9. Midwife
10. Respiratory Therapist
11. Surgery Attendant
12. Other Attendant
13. Phlebotomist/Venipuncture R/T Team
14. Clinical Laboratory Worker
15. Technologist (non-lab)
16. Dentist
17. Dental Hygienist
18. Housekeeper
19. Laundry Worker
20. Security
21. Paramedic
22. Other Student
23. Other describe
24. TEST

These tables serve both Incident Reporting and Chart modules.
Warning: Should you make a change to this table, the change will affect all historical data loaded in BOTH modules. Contact support for more information.

Exit F12

Select the table which you wish to update/modify by clicking on the appropriate button. The tables in this grouping allow for a maximum of 50 entries each.

Click on the second flyout to proceed to the **Blood & Body Fluid Tables**:

Blood & Body Fluid Table

Maximum characters for Job Category 55

Table no.

Description

Go to:

- F2** Job Category of the Injured Worker
- F3** Where Did Exposure Occur
- F4** Was the Exposure the result of
- F6** How Long Contact with Your Skin
- F7** How Much Contact with Your Skin
- F8** Body Fluids Involved in the Exposure
- F9** Was the Exposed Part
- SF1** Did the Blood or Body Fluid
- SF2** Barrier Garments Worn at the Time of Exposure

Never change the description of a table entry once it has been used. The results will be irrecoverable. i.e. changing "white" to "blue" will also change all previously recorded data to "blue"

Job Category of the Injured Worker

1. Doctor (attending/staff): Specify Specialty
2. Doctor (intern/resident/fellow): Specify Specialty
3. Medical Student
4. Nurse RN
5. Nurse LPN
6. Nurse NP
7. Nurse CRNA
8. Nurse Midwife
9. Nursing Student
10. Respiratory Therapist
11. Surgery Attendant
12. Other Attendant
13. Phlebotomist/Venipuncture/IV Team
14. Clinical Laboratory Worker
15. Technologist (non-lab)
16. Dentist
17. Dental Hygienist
18. Housekeeper
19. Laundry Worker
20. Security
21. Paramedic
22. Other Student
23. CHA/HHA
24. Other Describe

These tables serve both Incident Reporting and Chart modules.
Warning: Should you make a change to this table, the change will affect all historical data entered in ISS modules. Proceed with care.

Exit F12

Proceed in the same manner as described above. The tables in this grouping allow for a maximum of 50 entries each

Add/Open a Chart Record

To add or open an existing record, click on **Chart** and select **Add New Chart Record** or **Open Chart Record** from either the drop down or the Sidebar menu. Select an employee and follow the panel instructions. Adding a new chart will open a blank record ready for data input. Opening will show a listing of the employee's chart records to date. You may look at any of these records or click on **Add Chart**. In either case the system will present a panel which defaults to the current date and time. Changes may be made to these fields as necessary.

1. Add new chart record
2. Open chart record
3. Review Dates Work Sheet

- 01 General Information
- 02 Result of Visit
- 03 Attributes
- 04 General Comments
- 05 Confidential Comms
- 06 Review Dates (Emp)
- 07 Form Letters
- 08 Doc. Folder (Chart)
- 09 Doc. Links (Chart)
- 10 Needlestick&Sharp
- 11 B.B.F. Exposure
- 12 Time Markers (Emp)

General Information

CK51 General Information

Last Name: MALL	Department: ADMIN Administration
First Name: AMANDA	Position: TEACHER
Birth Date: 01/01/1973	Status: P_FULLTIME

Date in & Time: 06/02/15 14:38	Managing Staff: SARA SARA K
Time Out: 14:52 Visit: 00:10	Entered By: SARA
Contact: BRAD PPT X 1234	Date Changed:

Classification: 1 OCCUPATIONAL
Reason: 1 MEDICAL VISIT

Memorandum for this employee appears only on this screen:

Memorandum last modified by: SARA 16/01/2009

PrvPg C-Q NextPg C-W Index CF12 Next Esc Home F11 Menu F12

- The **Date In** and **Time In** fields will auto-fill.
- **Wait** is the amount of time the employee had to wait before being seen. There are statistics available on **Wait** time that may help you in determining future staff requirements.
- **Contact** is a text field in which the user could note the employee's supervisor and/or telephone extension as a reference for future communication.
- **Managing Staff** will also be auto-filled with the name of the user currently logged into the system. However, should another user be responsible for managing this record, you may select the name from the directory provided. All reports selected by staff will be based on the Managing Staff user identified.
- **Entered By** is auto-filled with the name of the user currently logged into the system. This allows for all data entered, and any changes made to be tracked and audited in the background of the system.
- The next two fields are table driven. Choose the appropriate **Classification** and **Reasons** by selecting from the corresponding list box located at the right of the panel.
- **Memorandum for this employee** allows the user to enter or view the text specifically in Chart regarding this employee.
- **Cancel Record** allows the user to cancel a chart record. From the **List of Chart Records**, the user may click on **F2 Show Cancelled Records** to see any records previously cancelled for an individual. A cancelled record may be **Reinstated** by clicking on the blue arrow at the top center on the **General Information** panel.
- **Copy Last Record** will auto-fill the **Classification**, **Reasons**, **Conditions** and **Treatments** from the last chart record entered for that employee. This significantly reduces data entry in situations where the employee is repeatedly attending the health centre for the same issue, ie. Physiotherapy.
NOTE: Only available under **Add new chart record**.

The screenshot shows a form with the following fields:

- Date In:** A text box containing '17/02/2014' with a calendar icon to its right.
- Time In:** A text box containing '11:05'.
- Wait:** Two empty text boxes for entering wait time.
- Contact:** A large empty text box for entering supervisor or telephone extension information.

Result of Visit

The next three fields are table driven. Choose the appropriate **Condition**, **Treatment** and **Action** by selecting from the corresponding list box located at the right of the panel.

CK53 Result of Visit

Condition F2		Treatment & Time F3	
25	Foreign Body	20	Ice
		19	Eye Wash
		2	Acetaminophen - 650mg p.o.

Action F4		Disability claim reported	
3	RTW-Mod Duties Only	F7	Add Incident
		SF4	Access Record
		F8	Link to Incident
		SF5	Unlink Record
		SF7	Add Work Acc Record
		SF8	Link to Work Acc Record

Time Out 12:30 Total visit time 00:03

PrvPg C-Q NxtPg C-W Index CF12 Next Esc Home F11 Menu F12

- **Add** allows the user to instantly switch to the **Incident, Disability or Work Accommodation modules** to add a new record. When the **Add** button is pressed, a blank record opens to the Description panel of the selected module. At this point the user may simply initiate the record by entering related details on any related record panels. When the **Menu** button is pressed, the user is returned to the **Results of Visit** panel of the **Chart** record. Only the modules the user has access to will be shown on the panel.
- **Link** allows the user to instantly switch to the **Incident, Disability or Work Accommodation modules** to link the **General Comments** of this chart to an existing record. When the **Link** button is pressed, the employee's list of records from the selected module appears. Click on the record that the General Comments should be linked to, and the system will automatically return to the **Results of Visit** panel of the **Chart** record. Only the modules the user has access to will be shown on the panel.
- **Time Out**, when entered, will calculate the total time of the visit.

When using the **Add** feature, the record added from Chart will have asterisks with a note at the bottom of the panel indicating the record was added from another source and needs to be reviewed.

CA06 List of Claims				MARK BRACEBRID
	Date	Claim No.	Descript	
1.	31 Mar 15***Std		RT Elbow	
2.	05 Mar 13 Std		TEST FOR	
3.	16 Feb 03 Std	9876543210	Back Inj	

*** Added from another source. Needs to be reviewed

The Chart Directory for the employee will indicated in columns to the right that the Chart record is linked to a module.

CK06 List of Chart Records							JUDITH HREICH Full-time IT MANAGER 2119 Key 119	PKD-Company 1
Date	Time	Classification	Reason	Condition	Staff	LK FD IN DM WA		
1. 02 Jul 15	16:00	OCCUPATIONAL	INITIAL VISIT	Burn	SARA	IN		

Legend:
LK Document Links
FD Doc Folders
IN Incident Reported
DM Disability Reported
WK Work Accommodation
Record

No. of Records 1

Attributes

Access the Sidebar menu to select the **Attributes** panel. Make the appropriate selection(s) of Category from the choices in the left column and select an attribute(s) from the Category. The selected attributes will appear in the right hand column. Those tagged on a Chart record will be reportable within the Chart module only.

The screenshot shows the 'CTC2 Attributes' window. At the top right, it indicates 'Maximum 6' and 'Selected 1'. The window is divided into three main sections:

- a) Select Category, then click on >>**: A list box containing 'Body Part', 'Injury', 'Condition', and 'Admin Note'. 'Body Part' is selected.
- b) Select Attribute, then click on >>**: A list box containing various body parts and limbs, such as 'Abdomen', 'Ankle LT', 'Ankle RT', 'Arm Lower LT', etc. 'Ankle RT' is selected.
- d) Attributes Selected**: A list box showing the selected attribute, 'Ankle RT'.

Between the first and second list boxes is a vertical bar with 'F2' and '>>' at the bottom. Similarly, between the second and third list boxes is a vertical bar with 'F5' and '>>' at the bottom. At the bottom of the window, a note states: 'To remove, double click on selected Attribute or down arrow and press enter'.

If an Attribute is selected in error, double click on the selected error. The system will ask if the Attribute should be deleted. Indicate **Yes** and that Attribute will be removed from the list of tagged attributes.

General Comments

General Comments opens a blank text box and is used to record additional information of a general nature. Each box of Comments entered will be tagged with the user's ID, date and time. While working in Comments, you may make changes to any text currently entered. However, when you exit, the **General Comments** are "locked" and cannot be altered. You can add additional Comments in subsequent boxes.

General Comments can be viewed from the **Incident Reporting** module providing that you have given permission by linking a **Chart Record** to an incident.

CK52 General Comments	
<div>Date 13/09/2019</div> <div>Entered by: SARA 13/09/2019 8:35</div> <div>5 No. of comments prior to this session.</div>	<div>General Comment for Chart</div>

Confidential Comments

Confidential Comments opens a blank text box and is used to record comments of a confidential nature. Confidential comments works the same way as General Comments with the exception that they cannot be accessed from Incident Reporting. Under Security, access can be denied to the Confidential Comments by the client to all Chart Records.

CK59 Confidential Comments	
<div>Date 13/09/2019</div> <div>Entered by: SARA 13/09/2019 8:38</div> <div>5 No. of comments prior to this session.</div>	<div>Confidential</div> <div>Confidential Comment for Chart</div>

Review Dates (Employee)

Activities or follow-ups for an employee may be tracked under **Review Dates**. Pull pre-defined reviews by clicking **Standards F6** or click on **Add Activity**. Enter a date of the activity and tab to the User ID. The **User ID** will auto-fill based on the user currently logged into the system. The User responsible for completing the activity may be changed by clicking on the arrow at the top of the User ID column or by clicking the **Change User F9** button at the right of the panel. Tab to the **Activity** field and enter the activity.

The **Done** checkbox, when checked, will auto-fill a review date item, stamping it with today's date and the User ID of the user currently logged into the system.

	Date	User Id	SF1	Activity	Done	Details
1	27/05/2022	SARA		CALL EE ABOUT RECENT VISIT TO HC - CURRENT	<input type="checkbox"/>	<input type="checkbox"/>
2	29/05/2022	SARA		IF DR NOTE WAS NOT REC'D - CALL EE AND DISCU	<input type="checkbox"/>	<input type="checkbox"/>

Buttons on the right: Standards F6, ReAssign F9, Date Sort F3, To Do F4, Show All F7, Overdue F8, Archive SF4.

The **See Details** checkbox will open a panel which allows the user to enter the **Action** taken related to the Activity, and enter a **Completion Date**. The system will auto-fill the **Done** checkbox. Do NOT check this box because it will overwrite your action.

Archive SF4 will place completed review dates in an accessible spreadsheet.

Several reports are available related to Chart Review Dates.

CK19 Activity Details

Target Date: 24/05/2022

User: SARA (SF1)

Activity: CALL EE ABOUT RECENT VISIT TO HC - CURRENT !

Did: Completed on 24 May 22 by SARA: ☒ Done

Completion Date: 24/05/2022

Close F12

Form Letters

To generate a form letter for an employee click on **Get Template** and select from the drop down list provided. The variables associated with the chosen template will auto-fill as the form letter is displayed. Text may be inserted or deleted throughout the letter is required. Doing so will not change the master form letter template content. Each letter may be a maximum of three pages in length.

Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

Clicking **Link Doc** will store the letter for future reference on the Document Links panel of the record.

By entering a **Reply Due Date** and clicking on **Add Reminder**, the system will add an activity to the Review Date panel of the record.

When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

The **Reply Required** box will be checked if the master form letter template identifies that this Form Letter requires a reply. The **Letters Requiring Response** will identify this letter until a **Reply Date** is entered.

To send the letter, click **SF8 Email letter to**: This opens a panel in which the worker's email address will auto-fill, allow for the additional recipients and provide editable text indicating the Form Letter is an attachment to the email. Ten additional attachments may be sent with the letter by clicking attach File F9 or Doc Link SF9 and selecting a file from the browser or from the list of document links. A copy of the letter, a copy of the email and a copy of each additional attachment will be automatically added to Document Links. The emailed Form Letter, the Letter Attachment and all additional attachments will be recorded in the TMB Audit.

The screenshot displays the 'CK64 Form Letters' application window. The main area shows a form letter template with the following content:

Aug 20, 2021

Natasha Aina
123 Troy ST
London, Ontario
N6P 1H7

Dear Natasha,

Department: Human Resources
Position: Associate

RE: Visit Date: Jun 22, 2021

Please be advised that following your Health Centre visit today, we were able to reach your Physician and get the required information as discussed.

Regards,

Sara Kane
Manager
OHS

The right-hand panel contains the following fields and controls:

- Letter No. 1**
- Title**: Sample Chart Letter
- ☐ **Reply Required**
- Reply Due**: [Text Field]
- Last Printed**: [Text Field]
- Reply Date**: [Text Field]
- d) Comments**: [Text Area]
- SF8 Email letter to**: s.kane@parklanesys.com
- Buttons: P1 F2, P2 F3, P3 F4

Document Folder (Chart)

The **Document Folder (Chart)** feature allows the user to paste text documents or type notes for future review in this record. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a Word document). Once a document is entered, changes may be made by the original author until midnight. The **See List** button lists all documents in the folder. Access to the **Remove** function is controlled by Security. The Remove button will delete document.

The screenshot displays the 'CK56 Document Folder specific to this chart record' interface. At the top, there are four buttons: 'Add Record' (with a green plus icon), 'See List' (with a blue list icon), 'Print' (with a printer icon), and 'Remove' (with a trash can icon). Below these buttons is a 'Reference' field containing the text 'Email from Supervisor'. The main content area shows an email header and body. The header includes 'From: Sara Kane', 'Sent: Wednesday, March 26, 2014 4:26 PM', 'To: Doug Adams', and 'Subject: John Hurt - Medical Leave'. The body starts with 'Hi Doug,' followed by a paragraph: 'Just as an FYI, John will be absent from work due to an approved medical leave. The Hlth Ctr will keep you advised as to his RTW status when available.' It ends with 'Thanks, Sara Kane' and 'Occ Hlth Services'. To the right of the email content is a 'Metadata' box with the title 'Entered by:'. It contains three input fields: the first has 'SARA', the second has '03/26/2014', and the third has '16:20'.

Document Links (Chart)

The **Documents Links (Chart)** feature allows the user to link and view documents that are related to the employee in this record.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

Move the cursor to the Origin column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Add Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **See Link**. The system will call up that document. Up to 800 documents may be linked to one employee.

Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

CTL1 Document Links

F8 Sort Docs F5 Find a document No of Links: 4

##	User	Date	Origin	Doc Date	Description
1	SARA	12/10/2016	Form Ltr	12/10/2016	Sample Chart Letter
2	SARA	12/10/2016	Form Ltr	12/10/2016	Sample Chart Letter
3	SARA	12/10/2016	skane	11/10/2016	dr note
4	SARA	12/10/2016	skane	15/10/2016	email re...
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

* Indicates the document was not linked

Link F4
View F2
GoToBlank F9
FileName F3

Go to Links:

001-100 F6
101-200 F7
201-300 SF3
301-400 SF4
401-500 SF5
501-600 SF6
601-700 SF8
701-800 SF9

SF7 Remove Link

Needlestick & Sharp Object

The Needlestick & Sharp Object panel is an optional feature which is specifically activated for Health Care facilities in tandem with the Blood & Body Fluid Exposure panel. Pre-defined dropdowns as well as text fields combine for the completion of this panel if the incident circumstances require.

CHDR02 Needlestick & Sharp Object SF7 Remove Record 1 of 2 > Print

a) Job Category of the injured worker?	<input type="text" value="Nurse : RN"/>	Where injury occur?	<input type="text" value="Patient Room"/>
Other, Describe	<input type="text"/>	Other	<input type="text"/>
Department where injury occurred	<input type="text" value="ADMIN"/> Admin 1 <input type="button" value="F3"/>		



b) Was the source patient identifiable?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk <input type="radio"/> N/A	Was the injured worker the original user of the sharp item?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk <input type="radio"/> N/A
Was employee trained in proper use of device?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk <input type="radio"/> N/A		

d) The sharp item was	<input type="text" value="Contaminated was there blood on the device Yes"/>
For what purpose was the sharp item originally used?	<input type="text" value="To Draw Venous Blood Sample if used to draw blood was it? Direct stick?"/>
Other, Describe	<input type="text"/>
Did the injury occur?	<input type="text" value="Between Steps of a Multi-step Procedure (between incremental injections, passing instruments, etc.)"/>
Other, Describe	<input type="text"/>

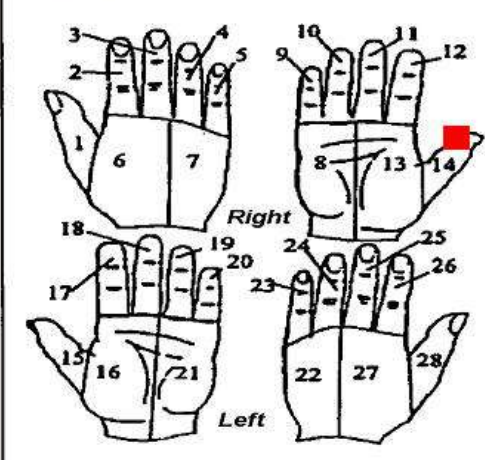
f) What type of device caused the injury?	<input type="radio"/> Needle-Hollow Bore <input checked="" type="radio"/> Surgical <input type="radio"/> Glass <input type="radio"/> Other
Needle/Surgical/Glass	<input type="text" value="Vacuum tube (plastic)"/> Other Describe <input type="text"/>
Brand Manufacturer Product	<input type="text"/>
Model	<input type="text"/>

If the Item Causing the Injury was a Needle or Sharp Medical Device, was it a "Safety Design" with a Shielded, Recessed, Retractable, or Blunted Needle or Blade?	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unk <input type="radio"/> N/A	Was the Protective Mechanism Activated?	<input type="text" value="Yes, fully"/>
Did Exposure Incident Happen?			<input type="text" value="After activation"/>

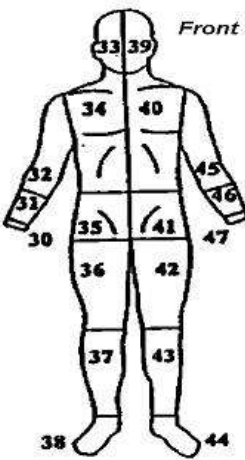
[Ctrl+Enter] Go to any panel
[Ctrl+x] Move cursor to field x

CHDR03 Needlestick & Sharp Object Injury Report 2 of 2   Print

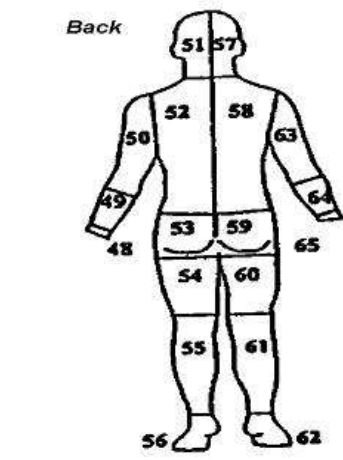
Mark the Location of the Injury:



Right
Left



Front



Back

Was the Injury? Moderate (skin punctured, some bleeding)

Dominant Hand of the Injured ☒ Right-handed ☐ Left-handed ☐ N/A

If Injury was to the hand, did the Sharp Item Penetrate? Single pair of gloves

For Injured Healthcare Worker: If the Sharp had no Integral Safety Feature, Do you have an Opinion that such a Feature could have prevented the Injury?

☐ Yes ☐ No ☒ Unknown ☐ N/A

Describe:

For Injury Healthcare Worker: Do you have an Opinion that any other Engineering Control, Administrative or Work Practice could have prevented the Injury?

☐ Yes ☒ No ☐ Unknown ☐ N/A

Describe:

PrvPg CtrlQNxtPg CtrlWIndex CtrlF12Next EscHome F11Menu F12

B.B.F. Exposure

The Blood & Body Fluid Exposure panel is an optional feature which is specifically activated for Health Care facilities in tandem with the Needlestick & Sharp Object panel. Pre-defined dropdowns as well as text fields combine for the completion of this panel if the incident circumstances require.

The image displays two overlapping screenshots of a software interface for reporting Blood & Body Fluid (B.B.F.) exposure. The top screenshot shows the main form titled "CHDR05 B.B.F. Exposure" with a "SF? Remove Record" button and a "1 of 4" indicator. The form includes fields for "a) Date and time of exposure", "Department where incident occurred" (with a dropdown showing "ADMIN" and a text field "Admin 1"), "What is the Job Category of the injured worker?", "Where did the exposure occur?", and "Was the Source Patient Identifiable?" with radio buttons for "Yes", "No", "Unk", and "N/A". Section "b) Which Body Fluids were involved in the exposure? (select all that apply)" features two columns of dropdown menus and a text field for "Other, please describe". Section "d) Was the body fluid visibly contaminated with blood?" has radio buttons for "Yes", "No", "Unk", and "N/A". The bottom screenshot shows the expanded form titled "CHDR05 Blood and Body Fluid Exposure Report" with a "2 of 4" indicator. It includes "Was the Exposed Part? (select all that apply)" with dropdowns for "Intact Skin" and "Other Please describe". "Did the Blood or Body Fluid? (select all that apply)" has dropdowns for "Touch Unprotected Skin" and "Soak through barrier garment or Protective Garment". "Which Barrier Garments were Worn at the Time of Exposure? (check all that apply)" includes dropdowns for "Single Pair Latex/Vinyl Gloves", "Lab Coat, Cloth (not a protective garment)", "Eyeglasses (not a protective item)", and "Other Please describe". A legend on the left side of the bottom screenshot indicates: "[Ctrl Enter] Go to any panel" and "[Ctrl x] Move cursor to field x]".

CHDR05 B.B.F. Exposure

1 of 4

a) Date and time of exposure

Department where incident occurred: ADMIN Admin 1 F2

What is the Job Category of the injured worker?

Where did the exposure occur?

Was the Source Patient Identifiable? ☐ Yes ☐ No ☐ Unk ☐ N/A

b) Which Body Fluids were involved in the exposure? (select all that apply)

Other, please describe

d) Was the body fluid visibly contaminated with blood? ☐ Yes ☐ No ☐ Unk ☐ N/A

CHDR05 Blood and Body Fluid Exposure Report

2 of 4

Was the Exposed Part? (select all that apply)

Intact Skin

Other Please describe

Did the Blood or Body Fluid? (select all that apply)

Touch Unprotected Skin

Soak through barrier garment or Protective Garment

Which Barrier Garments were Worn at the Time of Exposure? (check all that apply)

Single Pair Latex/Vinyl Gloves

Lab Coat, Cloth (not a protective garment)

Eyeglasses (not a protective item)

Other Please describe

[Ctrl Enter] Go to any panel
[Ctrl x] Move cursor to field x]

CHDR07 Blood and Body Fluid Exposure Report 3 of 4 Print

Was the Exposure the result of **Specimen Contact Leaked/Spilled**

Other, Describe

Specify Tubing

If Equipment Failure, Please Specify

Equipment Type

Manufacturer

For How Long Was the Blood or Body Fluid in Contact with Your Skin or Mucous Membranes?

Less than 5 Minutes

How Much Blood/Body Fluid Came in Contact with Your Skin or Mucous Membranes?

Moderate Amount (up to 50 cc, or up to quarter cup)

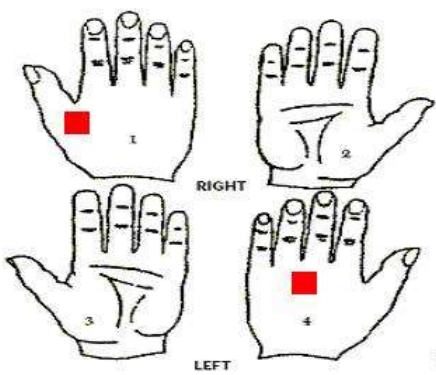
CHDR08 Blood and Body Fluid Exposure Report 4 of 4 Print

Mark the Location of the Injury

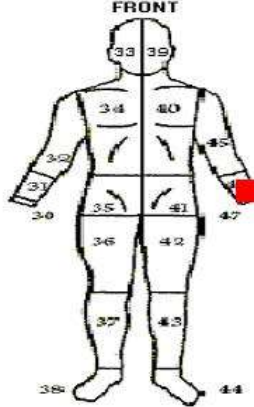
Largest area of exposure:

Middle area of exposure:

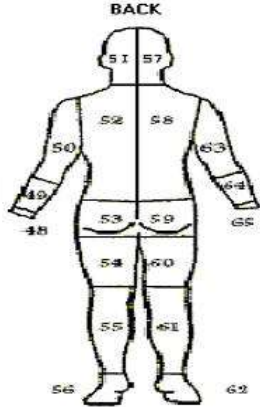
Smallest area of exposure:



FRONT



BACK



Describe the circumstances leading to this exposure (please note if a device malfunction was involved)

Cap difficult to remove. Applied upward pressure which caused spill.

For Injured Worker: Do you have an Opinion that any other Engineering Control, Administrative or Worker Practice could have prevented the Injury?

☐ Yes ☒ No Describe

☐ Unknown ☐ N/A

Time Markers

The **Time Markers** panel provides the user with the ability to track time related to various aspects of employee charting. The **Wait Time** fields capture the number of days passed waiting for requested information of documents. The calculated days do not include weekends. The **Time Log** fields capture the number of hours spent on noteworthy activities and meeting related to employee charting. The **System Time** is time spent in this employee as recorded by the system. **Descriptions** may be manually typed or selected from a table. An export is available on the **Charts > Exports** dropdown on the main menu of Chart.

CTM5 Time Markers

Staff F2 From Date F4 To Date F5 Wait Days F3 Description F6

a) Wait Time

Total Days: 2.00

	Staff	From Date	To Date	Wait Days	Description
1	SARA	28/04/2020	29/04/2020	2.00	Medical Documentation
2					
3					
4					
5					
6					
7					

b) Time Log

Total Hours: .30

	Staff	Date	Hours Spent	Description
1	SARA	28/04/2020	30	Phone Call with EE
2				
3				
4				
5				
6				
7				

d) System Time

Total Hours: 1.15

Date	Time Spent	User
11/05/2020	13:58 0:09	SARA
11/05/2020	13:47 0:08	SARA
08/05/2020	11:30 0:01	SARA
08/05/2020	10:47 0:01	SARA
05/05/2020	13:30 0:01	SARA
29/04/2020	10:06 0:42	SARA
28/04/2020	12:58 0:01	SARA

Wait Time: days passed waiting for pertinent information... Wait Days: calculated by the system, does not include weekends... Time Log: hours spent on noteworthy activities... System Time: time spent in this record as recorded by system... Descriptions may be typed or selected from a table... Please note that the same table is used by all modules... To remove a line: Clear all fields except staff. Next time, line will be removed... An export is available on the menu.

K04 Print this Chart

This report allows you to view and/or print the current Chart Record. Click the **K04 Print this chart** option on the sidebar menu and follow the panel instructions to view this report.

K04 Print this chart

K26 Employee's history

CT99 View Report

Search Page: 1 of 2

Version: 12-Preview Page: 0001 K04
Chart Date: 28 Feb 14
Chart Details Time: 15:14

Name: ANGER, SANDRA ID: 105 Status: Full-time
Department: MAINT, Maintenance Position: ASSOCIATE D.O.B.: 01 Jan 03 Key: 5

Date: 18/09/2006 In: 15:33 Out: 15:53 Time: 0:22 Wait Time: 0:10 Staff: DIANE

Contact:

Classification: NON-OCCUPATIONAL

Reason: INITIAL VISIT

Condition: Asthma

Action: RETURN TO WORK STATION

Comments:

Confidential: 18 Sep 06 ON EXAMINATION 18 Sep 06 15:43 SARA

K26 Employee's History

This report provides a history of the employee's chart records. Click the K26 Employee History option on the sidebar menu, select the timeframe and press Continue to view this report.

K04 Print this chart

K26 Employee's history

SL42 Select one option

F1 Go back 2 weeks

F2 Go back 3 weeks

F3 Go back 1 month

F4 Go back 2 months

F5 Go back 3 months

F6 Enter date range

CT99 View Report

Search Page: 1 of 2

Parklane Demo Data Page: 0001 K26
Chart Date: 13 Mar 14
Chart Records from to 13 Mar 2014 Time: 10:06

Name: BENSON, JOAN ID: 1120 Status: Full-time
Department: KWL1234, Kitchener - Sub office Position: TEACHER D.O.B.: 01 Jan 09 Key: 120

Date	In	Time	Staff	Total time
24 Feb 14	15:24	SARA	1:24	Classification: NON-OCCUPATIONAL Contact: brad Reason: INITIAL VISIT Condition: Headache Treatment: ACETAMINOPHEN - 650mg p.o. Action: SUGGEST SEEING FAM PHY RETURN TO WORK STATION
06 Feb 14	12:31	SARA		Classification: NON-OCCUPATIONAL Reason: INITIAL VISIT Condition: Burn Treatment: DRESSING Action: RTW-MOD DUTIES ONLY

Audit Report

SL42 Select one option

 F1 Go back 2 weeks
 F2 Go back 3 weeks
 F3 Go back 1 month
 F4 Go back 2 months
 F5 Go
 F6 Ent

15 Ministry Health Forms

 16 TMC Audit
 17 User Notes & Email
 18 Demographics
 19 In a Nutshell

CT99: View Report

Search

Page: 1 of 2

Version 12 Preview		Page: 0001 TMC
Audit:		Date: 28 Feb 14
Actions on or after 28 Feb 14		Time: 15:06
Any changes in this session are not included		
<div style="display: flex; justify-content: space-between;"> <div> Name: ABBOTT, PAULETTE Department: ADMIN, Administration </div> <div> ID: 156 Position: CLERK </div> <div> Status: Classed D.O.E.: 01 Jan 06 </div> <div> Key: 59 </div> </div>		
Date	Time	User
28 Feb 14	15:04	DA
Action	Field	Was
Record access		Now

General Test Requisition

Laboratory Requisition

The “**Report TMC Audit**” trail tracks activity in a Chart Record along with identifying the user and the detail of each activity.

User Notes & Email

The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program’s sent folder.

TMC Audit
User Notes & Email
 Demographics
 In a Nutshell

CTL9 Notes for other users regarding this employee

Note

PRE-EXISTING ISSUES - PLEASE CONTACT HLTH CTR FOR FURTHER INFORMATION

Original entry by:

Date

Last edit by:

Date

Enter a date if you want these notes removed automatically

Employee's Email: S.KANE@PARKLANESYS.COM

F2 Open mailto to send email to this employee

F3 Open mailto to send email to another user

Copy of email will be added to your Email Program's Sent folder

Demographics

The **Demographics** panel provides a read-only pop-up of the employee’s general demographic information. The Demographics panel is available in various module records for easy reference. Security controls which users will have access to the Demographics pop-up on module by module basis.

TMC Audit

User Notes & Email

Demographics

In a Nutshell

CT35 Demographics

Health No. 9876527353

Surname AFFLECK

Given Name BEN

Address 155 NUT ROAD

City, Prov.State LONDON ONTARIO

Country CANADA

Postal.Zip Code GIX5C3

Home Phone 416 222-2222

Business Phone 519 657-3386 2240

Cell, Foreign 416 222-3333

Birth Date 15/08/1972

Age 52

Sex Male

Marital Status Married

Language ENGLISH

Business Email k.ferrell@parklanesys.com

Personal Email

Department TES Parking - Meters

Employee Id. N170

Status Full-time

Position PARKING METERS

Hire Date 01/02/2012

Union UNION A

Supervisor FERRELL, KAREN JOAN SUPPORT

Daily Hours 8:00

Weekly Hours 40:00

Work Hours 8:00 to 17:00

Miscellaneous MISC 1 FIELD

Key 170

In a Nutshell

The **In a Nutshell** feature provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

TMC Audit
User Notes & Email
Demographics
In a Nutshell

Depending on the user's **Security** access, checkboxes to the right provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most recent five records. Attendance Management will show the most recent twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.

CTLA Employee Records in a Nutshell

Click check box under "R" to access actual record
Click check box under "C" to view general comments

Incident Reporting Last 5 recorded incidents showing

Inc. Date	Class	Expect Rtw	Rtw Date	Mod. Duty Date	Department	Injury	Status	Days	
10/06/2013	HC				ADMIN				<input type="checkbox"/>
04/06/2012	LT		30/07/2012	04/02/2013	ADMIN	LOW BACK STRAIN	App	42.00	<input type="checkbox"/>

Disability Management 3 claims have been recorded

First Day Off	Type	Expect Rtw	Rtw Date	Mod. Duty & Date	Department	Description	Days	
07/08/2012	Std	29/10/2012	29/10/2012	Yes 29/10/2012	ADMIN	FRACTURED LT PINKIE	55.00	<input type="checkbox"/>
02/07/2007	Std	30/07/2007	30/07/2007		ADMIN	FRACTURED LT FEMUR	111.00	<input type="checkbox"/>

Work Accommodation Last 5 recorded programs showing

Start Date	Occ?	Est. Stop Dt	Est. Term	Completion	Act. Term	Department	Result	
20/08/2013						ADMIN		<input type="checkbox"/>
12/11/2012	Yes	07/12/2012	4 Weeks	03/06/2013	29 Weeks	ADMIN		<input type="checkbox"/>

Attendance Last 25 time records showing


Date	Day	Department	Type	Hours	Cont.
01/03/2013	Fri	ADMIN	Sick with pay	7:30	
15/02/2013	Fri	ADMIN	Sick with pay	7:30	C
14/02/2013	Thu	ADMIN	Sick with pay	7:30	C
13/02/2013	Wed	ADMIN	Sick with pay	7:30	C

Date of Last Health Center Visit 11/06/2013 ☐

In Case Management Program? ☒ Yes

End Date of Last Case 31/12/2011

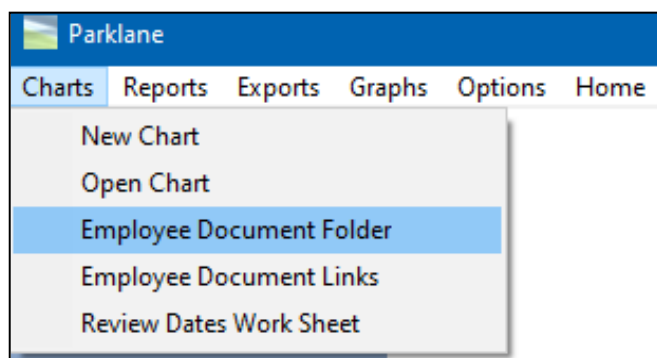
Employee Document Folder



The screenshot shows a web form titled "Employee Document Folder". At the top, there are two buttons: "Add Record" (with a green plus icon) and "Remove" (with a trash icon). Below these is a text field containing "ROBERT ANDERSON P_Fulltime PLANT F&B BARTENDER Key 115". The main area of the form is a large text input field labeled "Reference" at the top left. At the bottom left, there is a text input field labeled "Comments/Source". On the right side, there is a section labeled "Entered by:" with three input fields: "DA", "28/02/2014", and "15:33". At the bottom right, there is a button labeled "Exit F12".

The **Employee Document Folder** feature allows the user to paste documents or type notes for future review. Text only, no pictures or images. The maximum number of characters is 8,000 (equivalent to approximately 2 pages of a Word document). Once a document is entered, changes may be made until midnight and only by the original author. The **See List** button lists all documents in the folder.

Access to the **Remove** function is controlled by Security. Remove will delete the document.

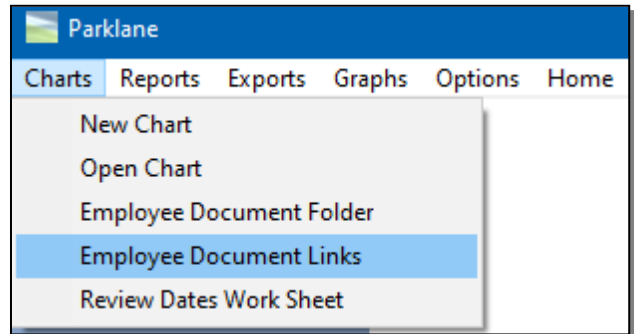


Employee Document Link

The **Employee Document Link** feature allows the user to link and view documents that are related to the employee in this module. These links are not connected to any individual chart record.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

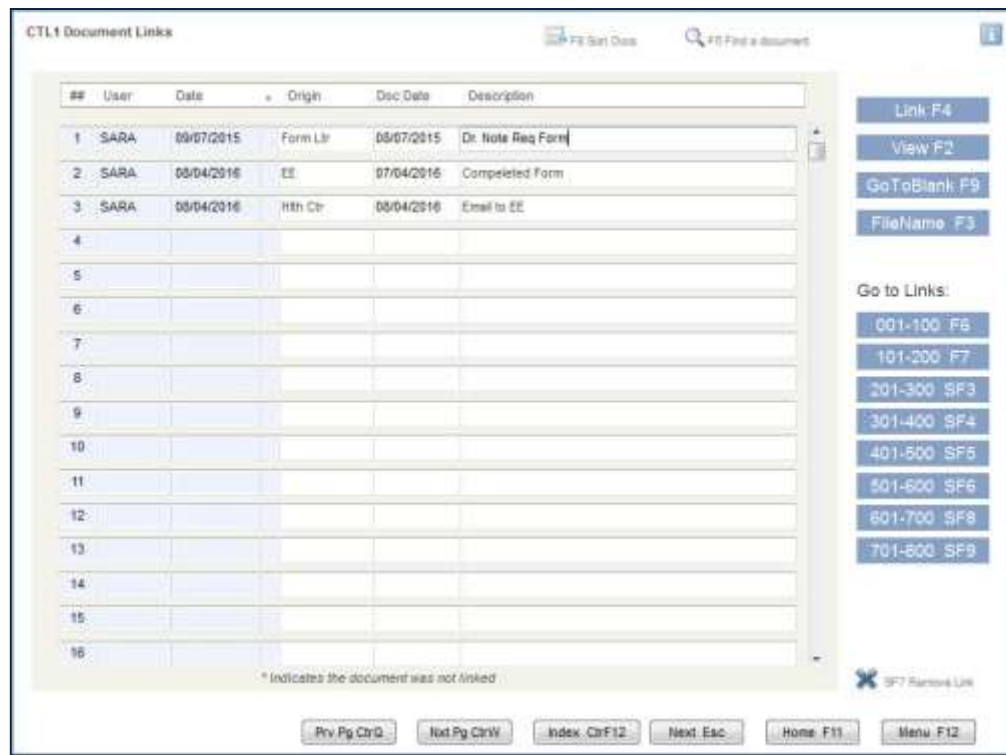


Move the cursor to the Origin column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that document. Up to 500 documents may be linked to one employee.

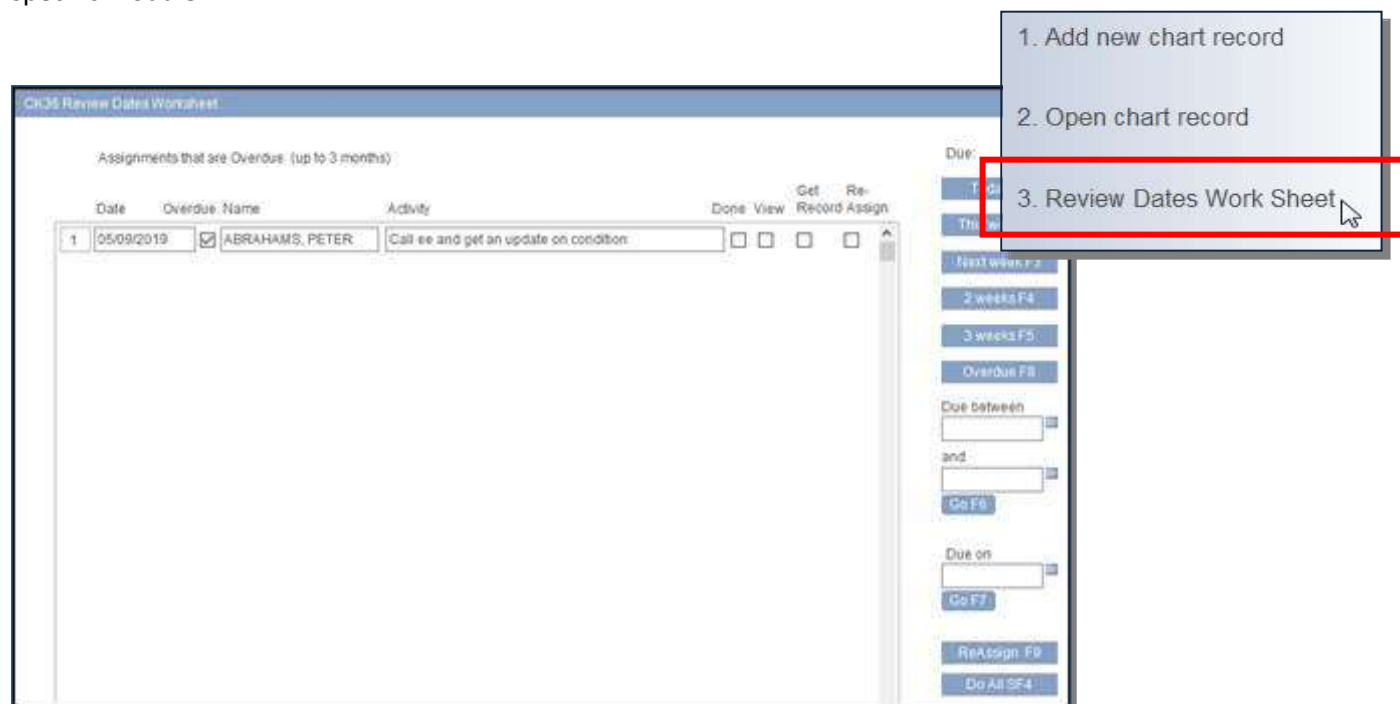
Access to the **Remove** function is controlled by Security. **Remove** will delete the document.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.



Review Dates Worksheet

The **Review Dates Worksheet** provides immediate access to the currently signed in user's review dates in this specific module.



The view from the module **Menu** panel are your review dates for all employees from this module which are overdue for up to three months prior. Alternative views are listed on the right side of the panel along with fields to enter specific date parameters or specific due dates.

The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

The **View** check box will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the activity, and enter a **Completion Date** for the Action. Do NOT click on the Done check box here, the system will auto-fill.

The **Get Record** check box will open the record associated with the review for the user to add, review or revise information on the panels specific to the record.

The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

See the **K22 Review Dates** report for an alternative method to access review dates for one or more users. The K22 Review Date report may be accessed from the sidebar or from the **Reports** dropdown menu.

Reports Available in Chart

Chart

New/Open Chart

K04	Print this chart
K26	Employee's history (2 wks to 3 mths)
TMC	Audit

Exports

K31	Chart Records
K2L	Review Dates
TM9	Time Markers

Reports

K67**	Office Visits
K18**	Selected Office Visits
K08	Summary of Visits
K09	Summary By Month
K10	Summary By Group or Department
K29	Departmental Summary by Month
K15	Selected Visits
K12	Select Attributes
K16	Attribute Totals
K14	Weighted Treatments
K13	Visits Calendar
K22	Review Dates
K74	Letters Waiting Response
K49	Employee History

Graphs

KHA	Visits YTD
KHB	Visit Trends
KHC	Visit Statistics
KHD	Needlestick/Punctures
KHE	Blood & Body Fluid
KHF	Comment Activity Report

Options

K38	Table Record Counts
K23	Missing Fields in Charts
K2J	Comments Audit
K2M	Comments Log
KMD	Audit Report
KMC	Audit Export

** Option to Create Export File in addition to Report

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